A CRM Covering to Managethe Services offered by an Institution

By

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A CRM covering to Manage the ServicesofferedbyanInstitution

LeadingeducationalbrassEduConsultProInstituteprovidesarangeofprogramsand courses in several subjects. The institute confronts difficulties in in effect handling the admissions process, student inquiries, andprofessionalconsultationservicesas the number of prospective students seeking admission risesyearafteryear.Inorder to overcome these obstacles, EduConsultPro Institute chooses to use Salesforce CRM to improve the entire undergo for admissions personnel and students by streamlining the admissions process.

The admissions procedure for potential students wishing to sign upforcoursesand programs provided by EduConsultPro Institute is the maintopicoftheusecase.The objective is to give students a smooth and open go through while allowing admissions staff to examine quickly and handle student inquiries, casemanagement, and admission diligence.

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Requirements

1. *AdmissionApplicationManagement:*

The institute's website or portal should provide prospective students with access to the admission coating form. A thorough set of data, including personal and Danish history, reservation, and personal details, should be gathered for the entrance application. diligence for admission that have been submitted ought to be recorded and kept in the Salesforce CRM database. Upon successfully submitting their diligence, students ought to receive automated email notice. It should be possiblefor admissions personnel to create dashboards and reports that examine trends in enrollment, acceptance rates, and applicant metrics.

2. *ApprovalProcessRequirements:*

To measure and approve consulting requests, implement an approval process in Salesforce. Configure an email display to inform pertinent students of their approval or rejection. Ensure that as soon as a request is created, it is automatically sent.

3. *Management ofaudienceServices:*

Through the institute's website or portal, prospective students ought to be able to make requests for audience services. The student's info, preferred consultationareas, and requisite areas of expertise should all be recorded in the consulting request form. Consulting requests that have been submitted ought to be noted in the Salesforce CRM system. It should be automated for advisors and consultants to receive email telling when new consultation requests are made.WithintheSalesforce CRM interface, consultants should be able to view, accept, and handle audience requests. Salesforce should allow for the scheduling of consulting appointments, including the appointment's date, time, and goal. It is important to monitor and change appointment statuses (such as planned, finished, or canceled) in Salesforce.

4. *Immigration Case Management:*

Students should be able to beginner immigration cases through the phone, email or web. Relevant data and case specifics should be recorded in the immigration case submission form. Immigration cases that are submitted ought to be tracked down and kept in the Salesforce CRM database. New immigration cases should be automatically notified by email to case managers and immigration agents. Immigration agents should be able to use the Salesforce CRM interface to see.

CreateObjectsfromSpreadsheet

TheLightningObjectCreatorisatoolthatmakesiteasiertocreatecustomobjectsin Salesforce from spreadsheets. Here is a detailed tutorial on how to accomplish that.

HowtoMakePersonalizedItemsfromaSpreadsheet:

1. *Create Courseobject*

    a. Select"createobjectfromspreadsheet"inyourobjectmanager.

    b. Toobtainthespreadsheet,Course,clicktheprovidedlink.

   c. Oncethefilehasbeendownloaded,uploadit,mapthefields,andthensubmititto create an object.
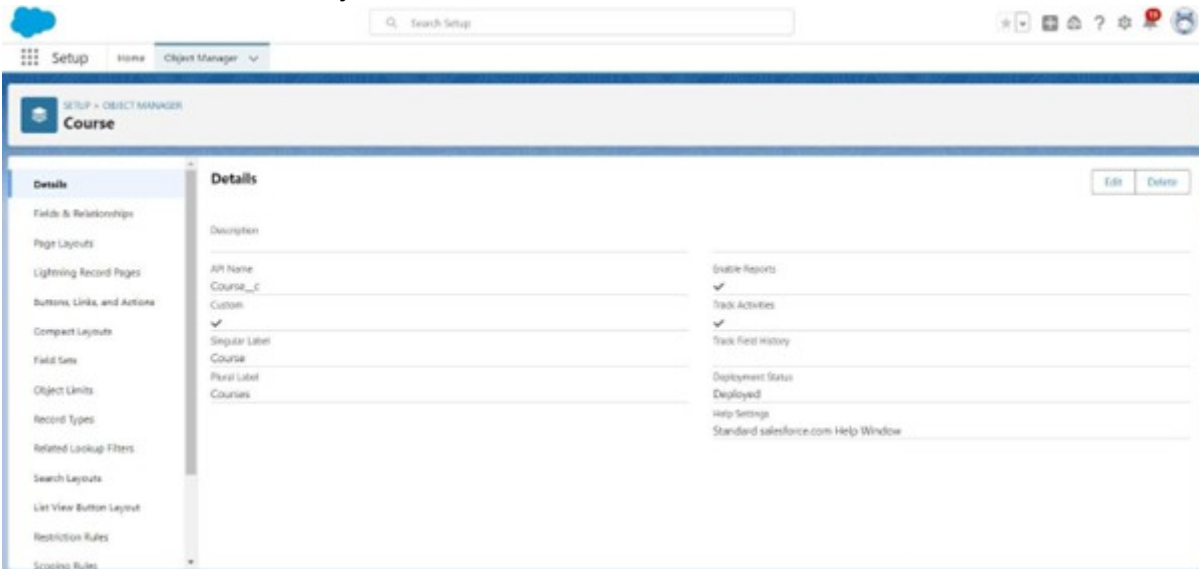
2. *Producetheremaining objects.*

    a. Takethesameactionsthatwedidtocreatethecourseobject.Fortheremaining items, use the following sheets.

        i.   Consultant

        ii.   Learner

        iii.   Scheduling
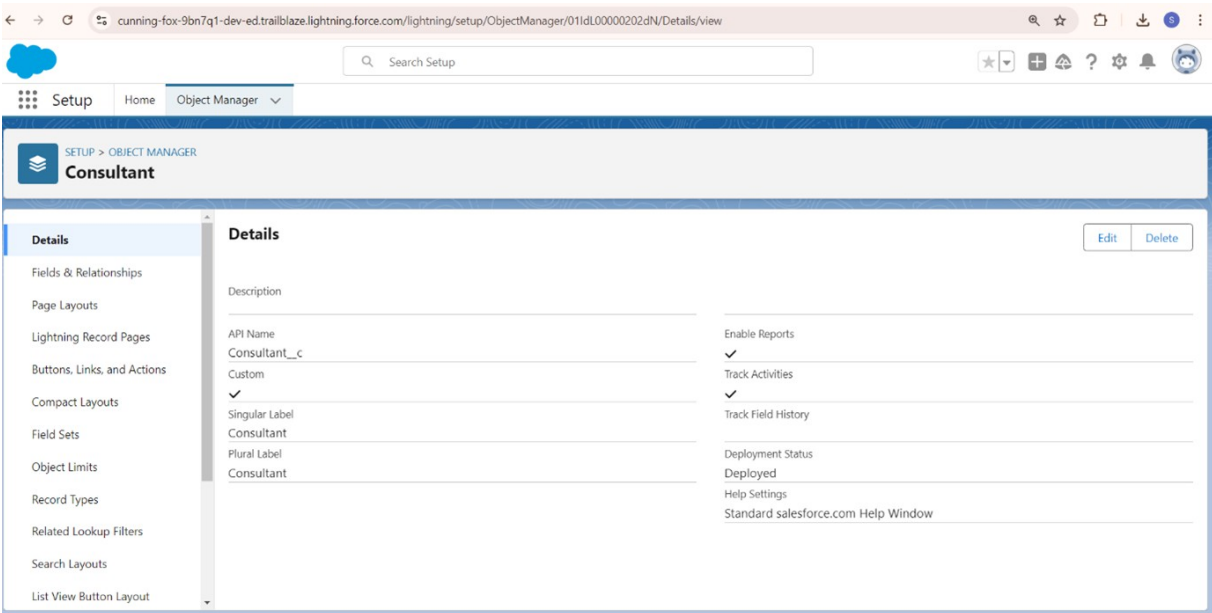
3. Makeconnectionsbetweentheitems

1. Makealookuptableforappointmentswithconsultantsandstudents.

2. MakeanobjectcalledRegistrationtoholdthestudentandcourseinformation.

3. Establishalookupfunctionbetweenthe student and the case in order to store the student's immigration or visa application queries.
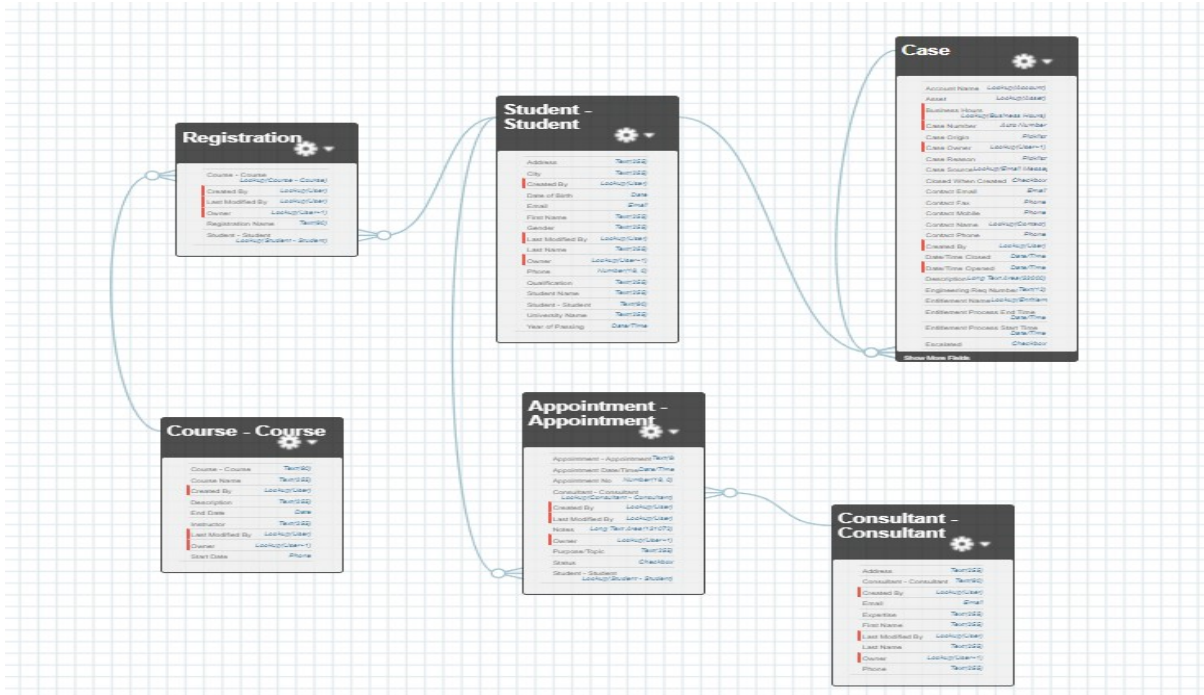
4. The data model ought to resemble the field-and relationship-filled data model below:

5. Make tabs for the corresponding object.

4. Set Up the Case Object

1. Go to object manager, edit case object.

2. Select the "Type" field and add the values in it.
   Immigration
   Visa Application

3. Now Select the "Status" field and add the values in it. Open
   In-progress

5. Create a Lightning App

1. Navigate to Setup and use Quick Find to look for the App Manager.

2. Select "New Lightning App."

3. Enter "EduConsultPro" as the app name, then click Next, Next, Next.

4. From the Available Items to the Selected Items, add Home, Students, Courses, Consultants, Appointments, Registrations, and Cases.

5. After selecting the "System Administrator" profile from the list of available profiles, click

Save & Finish.

CreateaScreenFlowforStudentAdmission Application process

1. *AddScreenElementFromSetup:*

    a. QuicklylocateFlowBuilder,thenchooseNewFlow->ScreenFlow.

    b. IncludeaScreencomponent.

    c. Enter"StudentInfo"forLabelintheScreenPropertiespane.

    d. To see every field that is part of the student object, click Fields, thenselecttherecord variable input and create a new resource called StudentRecordRes. Drag and dropany field that has to be added to the screen in order to gather student data.
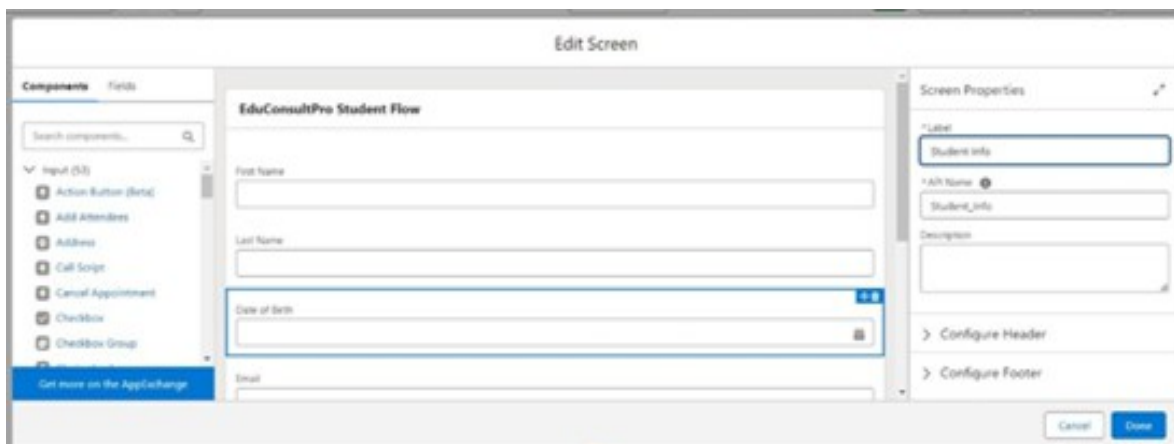
2. *Createanelementtocreateastudentrecord.*

    a. Place a Create element with the label "Create Student Record" after the Student Info Screen Element.

    b. Choose"useallvalues from a record" under How to Set the record fields and "one"under How many records to create.

    c. In the Student Info screen element, select therecordvariableresource (StudentRecordRes) that we created under Create a record from these values.

3. *Insert Screen Feature*

    a. Once the student record element has been created, add a screen element and nameit "course screen."

    b. Createapicklistelementfromtheleftsidepanel,nameit"SelectCourse,"type "IELTS" into the options, then hit Enter. The variable "IELTS" is created as a result.

    c. DothesamewiththeGMAT,TOEFL,Duolingo,andGRE.

4. *Add Decision Element*

    a. Add a Decision Element after Select Course Screen Element, label it as Selecting Course.

    b. Under outcome label it as "Selected IELTS" and write the condition such as below: Resource : Select_Course (Screen Component from Select Course Screen Element) Operator : Equals Value : IELTS (Choice Variable from Select Course Screen Element)

    c. Clickonthe"+"iconandRepeatstep2forotheroptionsmentionedasbelow:
       GRE
     GMAT

     DuoLin
     go
     TOEFL
 ClickDone.

5. *Add GET Record Element*

    d. AddaGETRecordElementafterDecisionElement,undertheIELTSpathandlabelit as "Get IELTS Rec".

    e. SelectObject:Course

ConditionRequirement:AllConditionsareMet(AND)

    f. Field : Course
      Name Operator
      : Equals
      Value:{!Select_
      Course

    g. Repeatthesteps1&2fortheGRE,GMAT,TOEFL,DuoLingopaths.

6. CreateRegistrationRecordusingCreateRecordsElement

    h. AddaCreateelementaftertheGetIELTSRecelementandlabelitas"CreateIELTS Registration Rec".

    i. Select"one"underHowmanyrecordstoCreate,andselect"Useseparateresources, and literal values" under How to Set the record fields.

    j. SelectObject:Registration

    k. Field :
Course_Namec
Value:{!Get_IELTS_
Rec.Id}

    l. Field :
Student_NamecValue:{
!StudentRecordRes.Id}

    m. Repeatthesteps1&2fortheGRE,GMAT,TOEFL,DuoLingopaths

7. CreateEmailTextTemplateVariablesforemailbodyand subject

    a. Click on the toggle toolbox on the left corner, click "New Resource", then select "Text Template" as Resource Type.

    b. GivetheAPInameas"StuRegistrationEmailTextTempBody",select"viewasplain text"and paste the below text in body.

"Dear{!StudentRecordRes.Name},

CongratulationsandwelcometoEduConsultantPro!

We are delighted to inform you that your registration on our platform has beensuccessfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.
At EduConsultantPro, we understand the importance of your academic and career goals, and we are committed to providing you with the highest level of support and guidance throughout your journey.
Hereareafewkeypointstohelpyougetstarted:

Explore Our Resources : Take some time to explore the wide range of resources, tools, and services available on the EduConsultantPro platform. From educational insights to immigration advice, we offer comprehensive support tailored to your needs.
Connect with Our Consultants : Our team of experienced consultants is here to assist you

at every stage of your educational and immigration endeavors. Don't hesitate to reach out to us with any questions, concerns, or inquiries you may have. We're here to help!

Stay Updated : Keep an eye on your inbox for important updates, announcements, and exclusive opportunities from EduConsultantPro. We'll ensure that you're informed about the latest developments and relevant information to support your journey.

Engage with the Community : Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

Once again, congratulations on taking this important step towards realizing youracademic and career aspirations. We are thrilled to have you as part of the EduConsultantPro family and look forward to supporting you on your journey to success.

Ifyouhaveanyquestionsorneedassistance,pleasedon'thesitatetocontactus.

Thankyou
.” Click
Done.

      c.   Repeatsteps1&2tocreateanemailtexttemplatefortheemailsubject,labelitas “StuRegistrationEmailTextTempSub”,writeatextmessageinthebodyandsaveit.

8. Addan ActionElement

1. AddanActionElementafteralltheDecisionpaths,labelitas“Send Email to Student”.

2. Under“Setinputvaluesforselectedaction”,includebody,RecipientAddressListand Subject.

3.ForinputBody:{!StuRegistrationEmailTextTempBody},
RecipientAddressList:{!StudentRecordRes.Emailc},
Subject : {!StuRegistrationEmailTextTempSub}.

9. AddScreenElement

1. AddaScreenElementaftertheSendEmailtoStudentActionElement,labelitas Success Screen.
2. FromtheleftsidepanelsearchfortheDisplaytextcomponentanddragittothemain panel, label it as “SuccessMessage”.
3. PastethebelowintheResourcepickerbox.

Dear{!StudentRecordRes.Name},

CongratulationsandwelcometoEduConsultantPro!

We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empoweringstudentslikeyoutoachievetheireducationalandimmigrationaspirations. Your Registration details have been sent through mail kindly check it once.

Thankyou."

4. ClickDone.
5. Savetheflowandnameitas"EduConsultProStudentFlow".Yourflowwilllookas shown below:
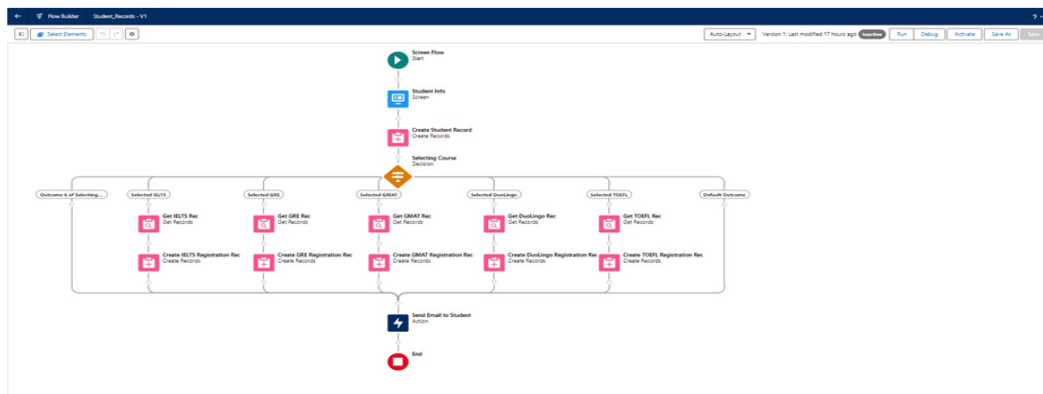
CreateUsers

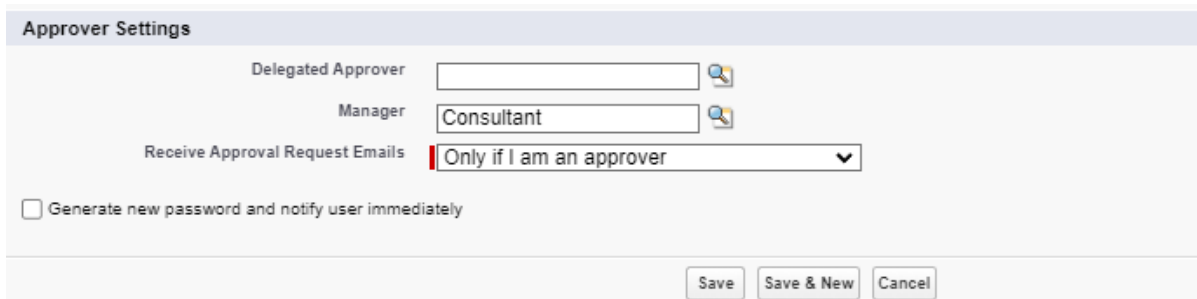Makeauserwiththeuserprofileofthe Standardplatform.

User

1. GotoSetup-->Administration-->Users-->NewUser

2. LastName:Consultant

3. License:SalesforcePlatform

4. Profile:StandardPlatformUser

5. Fillallthemandatoryfields&Save.

ConfiguretheUserSettings

1. GotoSetup-->Administration-->Users-->clickEditnexttoyourname

2. Scrolldowntobottom,underApproverSettings,Select"Consultant"theManager Field.

3. ClickSave.

Create an Approval Process for Property Object

1. Create an Email Template

1. From Setup, enter Templates in the Quick Find box, and then select Lightning Email Templates, toggle on.
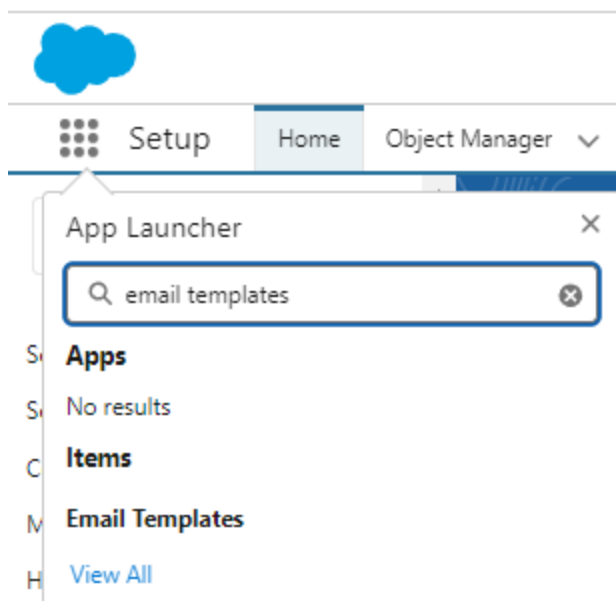
2. go to the app launcher, search for "Email Templates", Create a new folder with the desired name.
3. Then create a new email template, select the folder which we have created in the previous steps, enter the below text in the HTML Value, and Save it as "Submission Template".

"Dear {{{Appointment__c.Student_Name__c}}},

I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled for {{{Appointment__c.Appointment_DateTime__c}}} regarding {{{Appointment__c.PurposeTopic__c}}}.
Appointment Details:
 Appointment No : {{{Appointment__c.Name}}},
 Student Name : {{{Appointment__c.Student_Name__c}}},
 Consultant Name : {{{Appointment__c.Consultant__c}}},
 Date & Time : {{{Appointment__c.Appointment_DateTime__c}}},

Purpose : {{{Appointment__c.PurposeTopic__c}}}

I want to assure you that I am looking forward to our meeting and am fully prepared to address any questions or concerns you may have regarding {{{Appointment__c.PurposeTopic__c}}}. Your success and satisfaction are my top priorities, and I am committed to providing you with the guidance and support you need.
If you have any specific topics or questions you would like to discuss during our appointment, please feel free to share them with me in advance. This will help ensure that our time together is as productive and good as possible.

If for any reason you need to reschedule or cancel our appointment, please notify me at your earliest convenience so that we can make alternative transcription.

Once again, thank you for choosing to work with me on this matter. I am confident that our coalition will lead to positive outcomes and progress toward your goals.
If you have any questions or require further information before our scheduled appointment, please don't hesitate to reach out to me.
Looking forward to our meeting.
Best regards,

{{{Recipient.Name}}},

EduConsultantPro"

4. Create two more Email templates for Approval and Rejection of Request similar to the previous one.

Approver Settings

Delegated Approver		🔍
Manager	Consultant	🔍
Receive Approval Request Emails	Only if I am an approver ▼	

☐ Generate new password and notify user immediately

Save   Save & New   Cancel

2. Create an Approval Process

1. From Setup, enter Approval in the Quick Find box, and then select Approval Processes.

2. In Manage Approval Processes For, select Appointment.
3. Click Create New Approval Process --> Use Jump Start Wizard.
4. Configure the approval process.
5. Process Name - Appointment Approval, Under Select Approver, Select Manager for the option : "Automatically assign an approver using a standard or custom hierarchy field."

6. Click next and "Next Automated Approver Determined By" --> Select Manager.
7. From Record Edit ability Properties --> Click on Administrators OR the assigned approver can edit records during the approval process.
8. Save the approval process.
9. Click View Approval Process Detail Page.
10. Under Initial Submission Actions, click Add New --> Field Update, and configure it with these values.

Field	Value
Name	Submitted
Field to Update	Appointment: Status
A Specific value	Pending

11. click Add New --> Email Alert, and configure it with these values.
    Description : Submission Email Alert
    Unique Name : Auto Populates
    Email Template : Submission Template
    receiver Type : Select your Name
12. Repeat the Steps 10 - 11 for Final Approval and Final Rejection actions.

Email Template Name	Description	Folder	Last Modified By	Last Modified Date	
Rejection Template		Student Template	Buridi Vishnu Kanth	27/9/2024, 12:36 pm	▼
Approval Template		Student Template	Buridi Vishnu Kanth	27/9/2024, 12:23 pm	▼
Submission Template		Student Template	Buridi Vishnu Kanth	27/9/2024, 12:24 pm	▼

EMAIL TEMPLATES

Recent

Created by Me

Private Email Templates

Public Email Templates

All Email Templates

FOLDERS

All Folders

Created by Me

Shared with Me

Search recent email templates...

New Email Template

New Folder

Sales
Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Email Templates More

Create a Record Triggered Flow

1. Configure the Start Element

1. From Setup, enter Flows in the Quick Find box, then select Flows.
2. Click New Flow.
3. Select Record-Triggered Flow.
4. Click Create. The Configure Start window opens.
5. For Object, select Appointment.
6. For Trigger the Flow When, select A record is created. The flow will look like this:

2. Add an Action Element

1. Add an Action element after the Start Element and Select the Submit for approval action, label it as "Approval SubFlow".
2. Set the RecordId to "{!$Record.Id}".

3. Save the Flow, label it as "EduConsultPro Approval Flow and Click on Activate.

Create a ScreenFlow for Existing Student to Book an Appointment

1. Add Screen Element

1. From Setup, enter Flow Builder in quick find, select new flow? ScreenFlow.
2. Add a Screen element.
3. In the Screen Properties pane, for Label, enter "Get Student Information".
4. Add two Text components from the left side panel. Give the Labels as follows:
    Onest Text Component Label : Enter Student Name
    Wonder Text Component Label : Enter Student Email

2. Add GET Record Element

1. Add a GET Record Element after Decision Element, under the IELTS path and label it as "Get Rec".
2. Select Object : Student
    Condition Requirement : All Conditions are Met(AND)
3. Field : Student Name
    hustler : Equals
    Value : {!Enter_Student_Name}
4. Field : Email__c
    hustler : Equals
    Value : {!Enter_Student_Email}

3. Add Decision Element

1. Add a Decision Element after Select Display Student Details Element, label it as "Appointment or Case".
2. Under outcome, label it as "Appointment" and write the condition such as below:
    Resource : {!How_may_I_Help_you}
    hustler : Equals
    Value : {!Book_an_Appointment}
3. Click on the "+" icon and Repeat step two for the Case options mentioned.
4. Click on done.

4. Add Screen Element

1. Add a Screen element after the Decision Element, on the Appointment path, and label it as "Appointment Booking Screen".
2. Click on Fields, click on the record varying input and create a new Resource (AppointmentRecordRes) to display all the fields which are in the Appointment object.
3. Drag all the fields which are needed to add on the screen in-order to collect the student information.

5. Add GET Record Element

1. Add a GET Record Element after the Decision Element, under the Appointment path, and label it as "Get Consultant Rec."
2. Select Object : Consultant
   Condition demand : All Conditions are Met(AND)
3. Field : Name
   hustler : Equals
   Value : {!AppointmentRecordRes.Consultant_Name__c}

6. Create Appointment Record using Create Records Element

1. Add a Create element after the Get Consultant Rec element and label it as "Create Appointment".
2. Select "one" under How many records to Create, and select "Use separate resources and literal values" under How to Set the record fields.
3. Select Object : Appointment
4. Field : Appointment_DateTime__c
   Value : {!AppointmentRecordRes.Appointment_DateTime__c}
5. Field : Consultant__c
   Value : {!Get_Consultant_Rec.Id}
6. Field : Notes__c
   Value : {!AppointmentRecordRes.Notes__c}
7. Field : PurposeTopic__c
   Value : {!AppointmentRecordRes.PurposeTopic__c}
8. Field : Student_Name__c
   Value : {!Get_Rec.Id}

7. Add Screen Element

1. Add a Screen Element after the Send Email to Student Action Element, label it as "Confirmation Screen".
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "Appointment_Confirmation".
3. Paste the below in the Resource picker box.

4. Consultant Name : {!Get_Consultant_Rec.Name},
5. Date & Time : {!AppointmentRecordRes.Appointment_DateTime__c},
6. Notes : {!AppointmentRecordRes.Notes__c},
7. Click Done.

8. Add an SubFlow Element

1. Add a sub-flow element after the Decision Element, on the Case path, and search and Select for "Create a Case", label it as "Create Student Case".
2. Save the flow and label it as "EduConsultantPro Existing Student Flow", you can use the below image for reference.
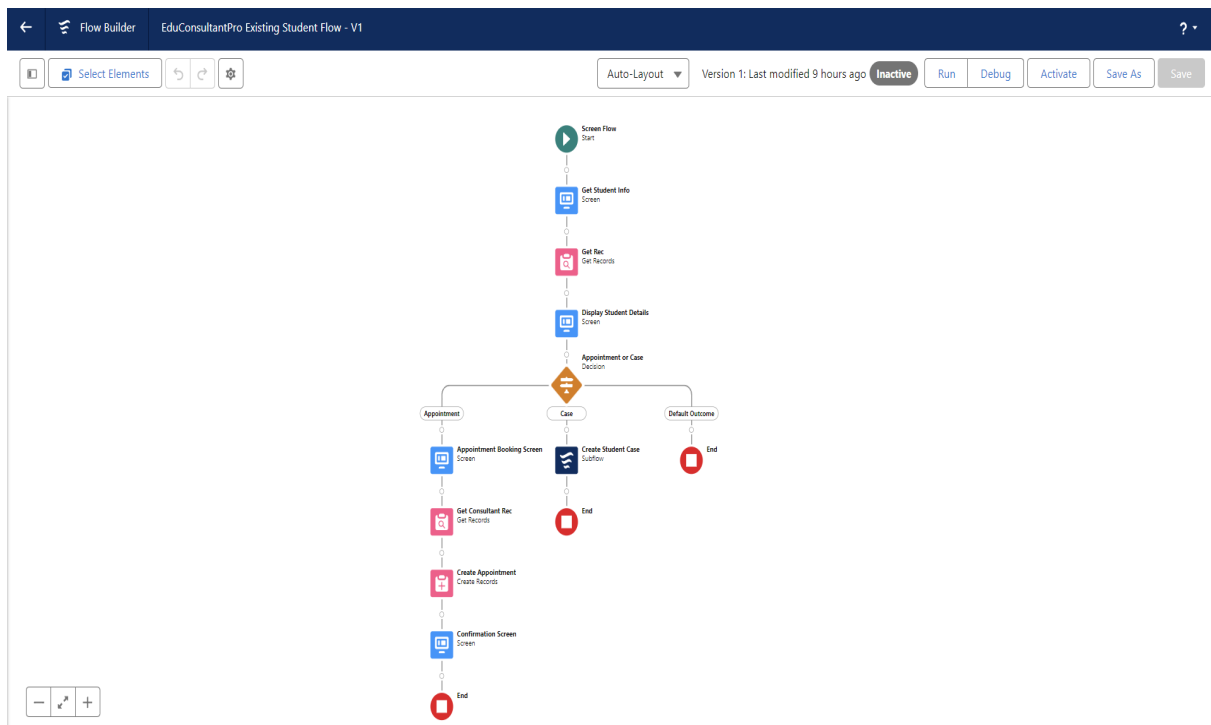
Create a ScreenFlow to Combine all the flows at one place

1. Add Screen Element

1. Add a Screen Element and label it as Welcome Screen.
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "SuccessMessage".
3. Paste the below in the Resource picker box.

"Welcome to EduConsultantPro

your premier destination for education and immigration solutions!

At EduConsultantPro, we understand that embarking on educational or immigration journeys can be both exhilarating and daunting. That's why we're here to guide you every step of the way with expertise, dedication, and personalized support.

Whether you're seeking to pursue your academic dreams abroad, navigate the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

Our team of seasoned consultants is committed to understanding your unique aspirations and crafting tailored strategies to help you achieve your goals efficiently and effectively. From selecting the right educational institution to navigating visa procedures, our comprehensive services cover all aspects of your journey.

At EduConsultantPro, we believe in fostering inclusive communities and unlocking the full potential of every case-by-case. With our unwavering commitment to excellence and integrity, we strive to make your experience with us seamless and rewarding.

Welcome to EduConsultantPro – where your ambition meet our expertise, and together, we pave the path to success. Let us embark on this transformative journey together!"

4. Click Done.

2. Add Screen Element

1. Add a Screen Element after the Welcome Screen Element; label it as "Existing or New Student Confirmation Screen".
2. Add a radio button component from the left side panel,
   label : Are you a Existing Student
3. Click on Add Choice --> type "Yes" in the input field --> click Create Yes choice.
4. Repeat step six and create an "No" choice resource.
5. Click Done.

3. Add Decision Element

1. Add a Decision Element after Existing or New Student Confirmation Screen Element, label it as "Decision 1".
2. Under outcome, label it as "If Existing Student" and write the condition such as below:
   Resource : {!Are_you_a_Existing_Student}
   hustler : Equals
   Value : {!Yes}
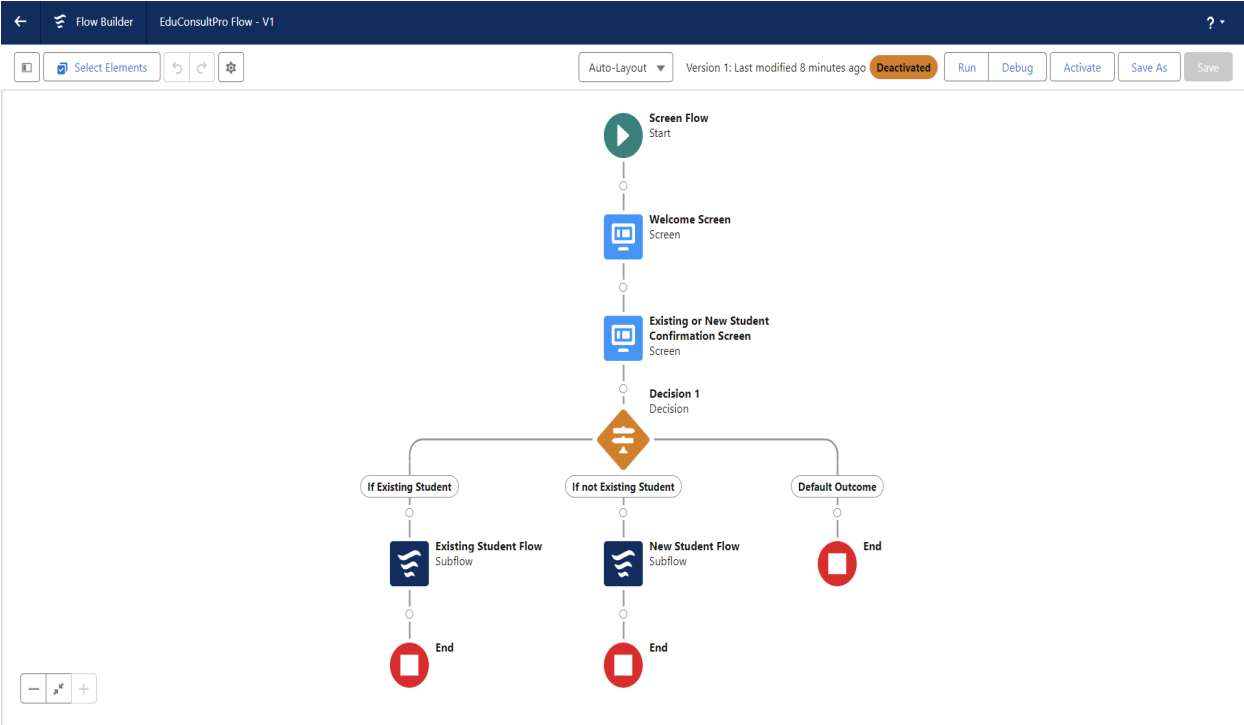3. Click on the "+" icon and Repeat step two for No options mentioned.

4. Add an SubFlow Element

1. Add a sub-flow element after the Decision 1 Element on the if Existing Student path and search and Select for "EduConsultantPro Existing Student Flow ", label it as "Existing Student Flow".
2. Save the flow and label it as "EduConsultantPro Existing Student Flow".
3. Click Done.

5. Add an SubFlow Element

1. Add a sub-flow element after the Decision 1 Element on the if Not an Existing Student path and search and Select for "EduConsultantPro Student Flow ", label it as "New Student Flow".
2. Save the flow and label it as "EduConsultantPro Existing Student Flow".
3. Click Done.
4. Save the flow and label it as "EduConsultPro Flow", you can use the below image for reference.

Select Elements

Auto-Layout ▼   Version 1: Last modified 8 minutes ago   Deactivated   Run   Debug   Activate   Save As   Save

Screen Flow
Start

Welcome Screen
Screen

**Existing or New Student
Confirmation Screen**
Screen

Decision 1
Decision

If Existing Student   If not Existing Student   Default Outcome

Existing Student Flow
Subflow

**New Student Flow**
Subflow

End

End   End

Create a lightning app page

Create a lightning app page and make it usable at the coating

1. From Setup, enter App Builder in the Quick Find box, then click Lightning App Builder.
2. Click New, select Home Page, then click Next.
3. Step through the wizard and name the page "EduConsultPro Home Page", select the Standard Home Page template, and then click Done.
4. Drag the Flow component to the top-right region.
5. Search for the "EduConsultantPro Flow" and click Save.
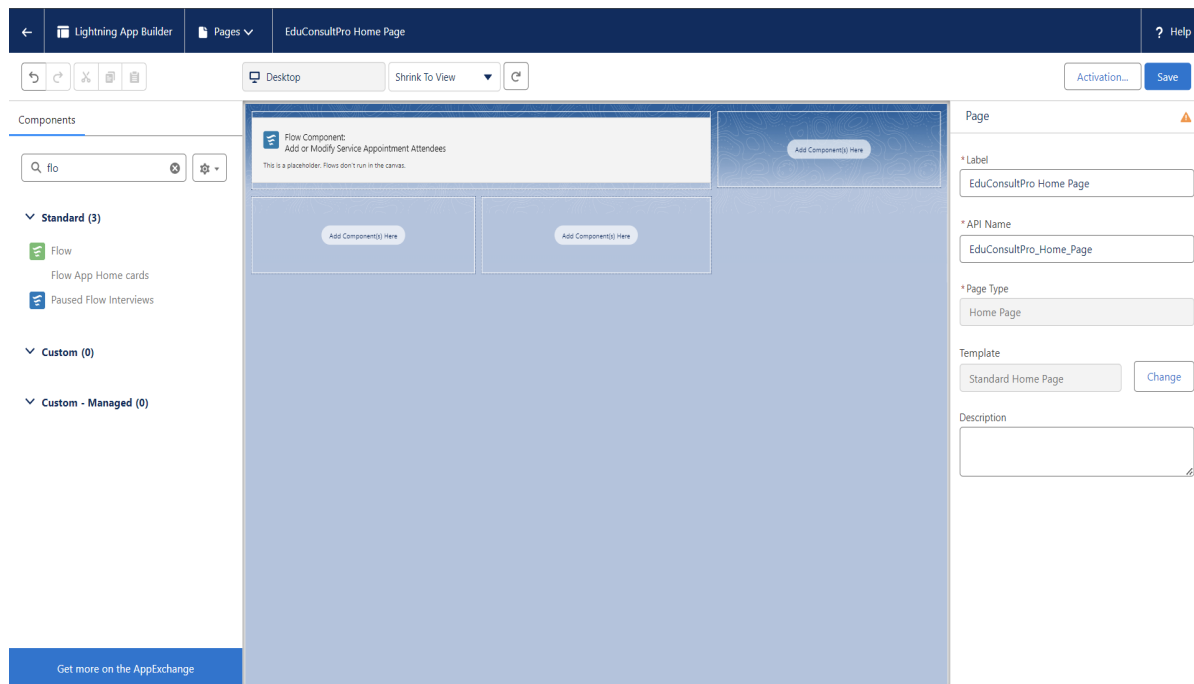
6. Click Activate, Click App and Profile, then click Assign to Apps and Profiles.
7. Select the Sales app, then click Next.
8. Scroll down the list of profiles and select System Administrator, then click Next.
9. Review the assignment, and then click Save.